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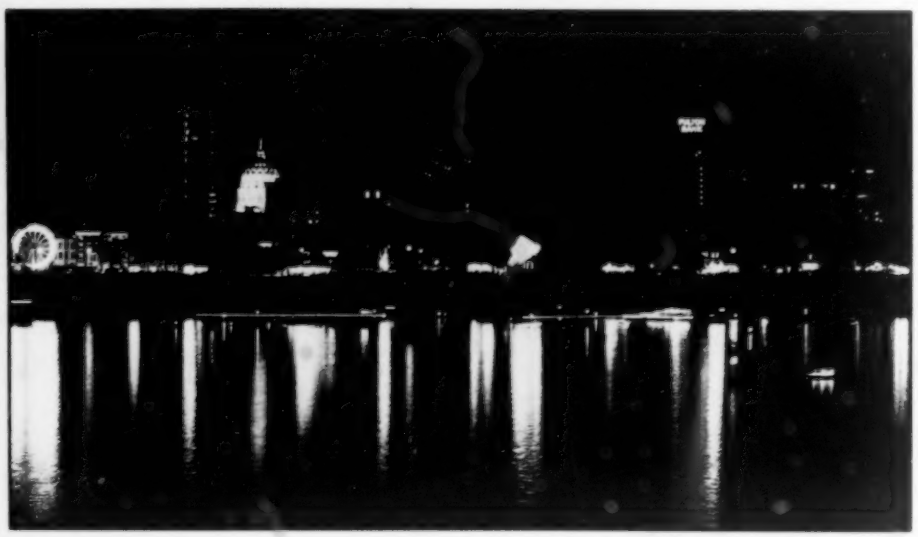

PRVCA RV EXPO: The Pennsylvania RV and Camping Association's RV Expo '92 in Harrisburg, Pa., kicks off the fall season with an exciting array of new products. See page 18.

RVIA Committee to Address Dealer Issues

In an effort to establish an ongoing forum for sometimes divisive manufacturer-dealer issues, RVIA's board of directors voted in June to add the Manufacturer Dealer Relations Committee to its roster of permanent standing committees. Working in concert with a slate of representatives from RVDA, the committee plans to address a number of longstanding concerns of RV manufacturers and dealers.

"I think the big news here is that we have finally established a means by which manufacturers and dealers can get together on a regular basis and work out mutual problems," said Mac Bryan, vice president of administration for RVIA. "There have been a lot of attempts to get the two groups together in the past, but this committee is really the first indication that RVIA and RVDA are going to do something about maintaining an open line of communication. There are many issues that the two groups have to discuss, and I think we will all see the committee tackling a full agenda of issues in the coming months."

Indeed, meetings of the group in Chicago and at the recent Midwest RV and Manufactured Housing Show in South Bend, Ind., yielded the following comprehensive list of items for further discussion.

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RVDA Begins Planning for Revamped Open House in '92

After RVIA's decision to turn over the reins of the National RV Open House Week to RVDA, the dealer association has moved swiftly to announce an aggressive campaign for a "New RVDA Open House" next spring.

"We are calling it the New RVDA Open House, with the emphasis on the 'new,' to make it clear that what we are doing is going to be a major change from what was done in the past," said Bob Strawn, RVDA executive director. "We think it is absolutely essential to get across the fact that we are making a fresh start with the entire program."

Jerry Greer, president of Jerry Greer Airstream Argosy, Columbus, Ohio, and current RVDA president, said that part of that fresh start would be to increase the number of days that the Open House encompasses in the future. He said the association's ultimate goal is a month-long program that will allow the dealers to take advantage of cooperative ventures with manufacturers, dealers, suppliers and campground owners.

A key element in RVDA's strategy will be to broaden participation to make the Open House more than just a "product-on-

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COVER PHOTO: CAPITAL REGION CHAMBER OF COMMERCE, HARRISBURG, PA.

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SECOND QUARTER STRUGGLED TO MATCH LAST YEAR'S PACE

GAYLORD MAXWELL

In the second quarter of 1991, our Dealer Advisory Board (DAB) ran nip-and-tuck with last year, which is sort of like racing for eighth place. Although there were definitely signs of a turnaround, there were just as many indications that business was headed in the opposite direction.

Sales volume for the DAB group as a whole was up very slightly over last year. However, fewer than half of the members of the board managed to equal last year in dollars taken in. In short, sales were still falling for many dealers in the April-June period.

In terms of total units sold, the second-quarter number approached the same period as 1990 but was still slightly off from last year's tally. New units fared a bit worse than used. On an optimistic note, sales of new motorhomes slipped into the plus column compared with last year's April-June period – the only type to achieve that distinction. However, three types of used units beat last year's unit-sales record during the second quarter. Many dealers reported more consumer interest in used and *inexpensive* new units than in higher-priced merchandise.

Another positive sign was the number of reports of good profits – both grosses and bottom lines. In fact, only one DAB member rated his grosses as poor, and only three said their bottom lines were very bad. Used units were particularly profitable, and back-ends did exceptionally well.

Inventories were reported to be in relatively good shape. Both new and used inventories were rated as average or low. Traffic was reported to be on the low side, as were new buyers.

Year-to-date figures indicated the struggle dealers were going through. Both sales volume and unit sales were down for 17 of our 21 members in the second quarter. Buyers were very, very price-conscious, and financing was a problem for many would-be buyers in debt up to the hilt.

In spite of this grim side to the second-quarter picture, we should note that all members of our DAB were still in business. They were coping – and some were doing very well.

Motorhomes

Many DAB members who stock this RV type were happier during the second quarter than they had been in some time. Actually, they were about evenly divided between those who were up in sales and those who were down (a 9-8 ratio), but the total was in the plus column for both new and used units – the first time that has happened in a long time. Class C's appeared to have made a comeback. Used sales were particularly good; they exceeded those of new units by 22%. Profits were generally rated in the good column.

Year-to-date sales of new motorized units were still lagging well behind those of last year, although new units were up somewhat in the second quarter. Still, the upswing during the second quarter offers some reason for optimism for the second half of the year.

Travel Trailers

After a fairly good start in the first quarter, travel trailer sales tumbled in the second. Twenty of our board members stock this type. Compared with last year's second quarter, seven were up in new-unit sales, 11 were down, and three said sales were the same. Used units were down even more than new. On the plus side, however, profits were rated good to excellent.

Year-to-date figures were much better than second-quarter figures for this type, thanks to a good first quarter in new-unit sales. (Used were about the same for both periods in 1990 and 1991.) It is difficult to figure out what is happening – sales rose sharply in the first quarter but turned steeply down in 1991's second quarter.

Truck Campers

Slide-ins suffered a drop in the second quarter, an even deeper dip than experienced by travel trailers. Nine DAB members stock new units, and, of these, six were down – including the three dealers who account for the majority of sales. Used units sold well, however.

Year-to-date, this type was running a bit behind last year in terms of new units but well ahead of the 1990 pace for used. Overall, it doesn't look like a good camper year, however.

Folding Camping Trailers

New-unit numbers were down for the second quarter although drastically improved from those for the first quarter. Of the 13 DAB members who stock this type of unit, eight were down, and five were up. Used sales declined considerably. Profit ratings were quite mixed – split between

	NEW UNITS						USED UNITS					
	SECOND QUARTER			YEAR-TO-DATE			SECOND QUARTER			YEAR-TO-DATE		
	1991	1990	% CHANGE	1991	1990	% CHANGE	1991	1990	% CHANGE	1991	1990	% CHANGE
MOTORHOMES	410	390	+ 5	675	776	– 13	524	476	+ 10	929	878	+ 6
TRAVEL TRAILERS	387	473	– 18	732	776	– 6	365	456	– 20	610	756	– 19
TRUCK CAMPERS	88	112	– 21	127	178	– 29	61	48	+ 27	101	91	+ 11
CAMPING TRAILERS	305	329	– 7	505	631	– 20	111	127	– 13	156	171	– 9
FIFTH-WHEELS	178	187	– 5	302	327	– 8	123	103	+ 19	209	204	+ 2

	SECOND QUARTER			YEAR-TO-DATE		
	1991	1990	% CHANGE	1991	1990	% CHANGE
SALES VOLUME	$48,247,000	$46,886,000	+ 3	$80,956,000	$88,223,000	– 8
TOTAL UNIT SALES	2,552	2,701	– 6	4,639	4,788	– 3
NEW-UNIT SALES	1,368	1,491	– 8	2,634	2,688	– 2
USED-UNIT SALES	1,184	1,210	– 2	2,005	2,100	– 5

good and poor.

The second-quarter drop was slight compared with the first-quarter slide, but the result was that the year-to-date decline was considerable. The major fold-down dealers were quite varied in their degree of success or failure for the year-to-date. Some were up impressively, whereas others were having great difficulties. There's no explanation for it, either.

Fifth-wheels

The second-quarter drop wasn't much, but our DAB had a decrease in new-fiver sales during the period. That decline followed a drop in the first quarter. The 16 DAB members who stock this type were evenly divided between those who were up and those who were down. Most of the major players turned in performances that were fairly close to last year's numbers. Used sales were up substantially. Profit reports were divided about evenly between fair to excellent. Δ

Although there were definitely signs of a turnaround, there were just as many indications that business was headed in the opposite direction.

The "DAB Perspective" is a compilation of data provided by *RV Business'* Dealer Advisory Board, a group comprised of 23 dealers representing a cross section of the U.S. dealer body.

Gaylord Maxwell, chairman; **Dave Altman,** Baldwin Park, Calif.; **Bob Azevedo,** Sunnyvale, Calif.; **Jack Cole,** Pacoima, Calif.; **Crosby Forrest,** Newport News, Va.; **Dan Gamel,** Fresno, Calif.; **Jerry Greer,** Columbus, Ohio; **Jerry Harrison,** Waco, Texas; **Robert Jensen,** Layton, Utah; **Johnny Ketelsen,** Marion, Iowa; **Newton Kindlund,** Orlando, Fla.; **Roger Kirschner,** Salem, Ore.; **Ozzie Lenhard,** Sayville, N.Y.; **Larry McClain,** Oklahoma City, Okla.; **David McMann,** Victor, N.Y.; **Annette Miller,** Fayetteville, N.C.; **Steve Moran,** Warwick, R.I.; **Tom Schaeffer,** Shoemakersville, Pa.; **Mel Shipp,** Chattanooga, Tenn.; **Jack Sisemore,** Amarillo, Texas; **Paul Skogebo,** Mesa, Ariz.; **Bill Thomas,** Bridgeton, Mo.; **Randy Thompson,** Crystal Lake, Ill.

This report is an attempt to reflect the current retail sales picture; it does not purport to indicate RV production or factory sales to dealers.

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